

Main Points in Data Collection

The Survey Coordinator (Matt) manages the data collection process at the state or regional level. This is an umbrella term referring to the role or roles that may encompass multiple people in the field, separated either by function or by geography, or both. The Survey Coordinator is responsible for the following tasks as they relate to the AoA's Recovery Act CDSMP project:

- Customize the forms and forms-management guidelines to their organization
- Train the Group Leaders on how to use the forms, and answers questions that arise
- Ensure that Group Leaders have the data collection forms before their CDSMP workshops begin
- Receive the completed forms from the Group Leaders
- Check the returned forms for clarity and completeness
- Follow up with Group Leaders, as needed, to clarify data on the returned forms
- Oversee or perform the data entry of the data from the data collection forms into the online data entry system

• Group Leaders are trained leaders of the CDSMP workshop. Two Group Leaders co-lead each session. In addition to leading the workshop sessions per CDSMP protocols, Group Leaders are responsible for the following tasks as they relate to the AoA's Recovery Act CDSMP project:

- Have all the necessary forms prior to Session 0 or 1 of each workshop
- Distribute the Welcome Letter and the Participant Information Survey to participants at Session 0 or 1
- Explain to the participants why the data are collected and answer participants' questions and concerns
- Record the participants' attendance at each weekly session
- Gather the completed Participant Information Surveys
- Check over the Participant Information Surveys for completeness and clarity (and clarify with participants as necessary)
- Return the Participant Information Surveys and Attendance Log to the Survey Coordinator in a timely manner

• Participants attend the CDSMP workshop sessions and provide demographic data about themselves. Both their attendance and their demographic data will be entered into the online data entry system.

An Overview of the Survey Packet

The survey packet consists of five forms – data collection forms and informational forms:

- Data collection forms. You will use three paper-and-pencil data collection

forms to collect the required data elements to be entered in the online data entry system.

- Workshop Information Cover Sheet – The purpose of the Workshop Information Cover Sheet is to collect data about each CDSMP workshop offered.
- Participant Information Survey – The purpose of the Participant Information Survey is to collect demographics about each participant in a workshop.
- Attendance Log – The purpose of the Attendance Log is to record how many participants completed a workshop.

• Informational forms. Two additional forms provide supporting information to the Group Leaders and participants but are not used to collect data.

- About the Workshop Forms Packet – The purpose of “About the Workshop Forms Packet” is to provide you with a place to document the data collection process that is unique to your organization and state. This is also a place to summarize information for, and provide checklists to, Group Leaders to ensure they collect and return quality data.
- Welcome letter – The purpose of the Welcome letter is to provide information to the participant about why their information is being collected.

Before each CDSMP Workshop

Before each CDSMP Workshop, the Group Leaders need to have a Survey Packet, including:

- One (1) About the Workshop Forms Packet
- One (1) Workshop Information Cover Sheet
- Up to 20 Welcome letters
- Up to 20 Participant Information Surveys
- One (1) Attendance Log

In addition, provide the Group Leaders with any specific guidelines and training, especially if this is the first time they are using the data collection forms.

Session 0 or 1 – During the workshop session

At the start of Session 1, or of Session 0 (if the workshop uses this optional preworkshop session), Group Leaders will:

- Explain why we ask workshop attendees to complete the Participant Information Survey and how their information is protected.
- Distribute the Welcome letters and the Participant Information Surveys.
- Collect the completed Participant Information Surveys.
- Review the Participant Information Surveys for legibility and completeness.
- Write the names of participants as they appear on the Participant Information Surveys onto the Attendance Log.
- Record participant’s attendance at Session 1. (Attendance at Session 0 is not counted.)

Session 1 – After the workshop session

If you want the data collection forms returned to the Survey Coordinator as they are completed, then Group Leaders will:

- Complete the first side of the Workshop Information Cover Sheet, and make a photocopy.
 - Return the Participant Information Surveys and the copy of the Workshop Information Cover Sheet to the Survey Coordinator.
- When the Survey Coordinator receives completed forms after Session 1, they will:
- Review the copy of the Workshop Information Cover Sheet and the completed Participant Information Surveys.
 - Clarify responses with the Group Leaders, if necessary.
 - Keep the Workshop Information Cover Sheet and the Participant Information Surveys together and in a secure place.
 - Watch for the completed Attendance Log to arrive after Session 6.

Sessions 2 through 6

For Sessions 2 through 6, Group Leaders will:

- At each session, record the participant's attendance on the Attendance Log.
- If a participant enrolls at Session 2: ask the participant to complete the Participant Information Survey. Review the completed form for legibility, write the participant's name on the Attendance Log, and return the Survey to the Survey Coordinator or save and mail with the Attendance Log at the end of the workshop, depending on your forms management process.
- If a participant wishes to enroll at Session 3 through 6: explain to the participant that they missed two sessions and will not receive the full benefit of the CDSMP workshop; ask them to enroll for Session 1 of the next workshop.

Session 6 – After the CDSMP workshop is completed

If the data collection forms were returned to the Survey Coordinator as they were completed, then the Group Leaders will:

- Complete the second side of the Workshop Information Cover Sheet.
 - Return the completed Workshop Information Cover Sheet and the Attendance Log to the Survey Coordinator. If there are any additional completed Participant Information Surveys, also return these to the Survey Coordinator.
- When the Survey Coordinator has all forms, they will:
- Review all of the completed data collection forms.
 - Clarify responses with the Group Leaders, if necessary.
 - Enter the data into the online data entry system.
 - Retain or destroy the paper forms.

QA and forms

Specific quality assurance items to look for in the data collection forms are as follows:

- Workshop Information Cover Sheet:
 - Make sure the Group Leaders' names and phone numbers are written legibly. The Survey Coordinator and/or data entry staff may need to contact them with questions about the data written on the forms.
 - On the second side of the Workshop Information Cover Sheet, there are additional reminders for Group Leaders to review their forms carefully

before returning the forms to the Survey Coordinator.

- **Participant Information Survey:**

- Link the participant's demographics to their attendance record. The participant's name (or alternative) provides a critical link between their demographic data and attendance.
- The critical link will fail if the participant's name is not unique within the group or if the name on either the Participant Information Survey or the Attendance Log is illegible or inconsistent between the two forms.
- If the participant wanted their name removed, Group Leaders must be careful that the non-name identifier on both forms is clear and that they match to ensure the participant's demographics will match the participant's attendance.
- Check the "Date of Birth": Make sure that it is actually a date of birth rather than "today's date" or birth month/day with current year.
- Check the "Race" and "Chronic Conditions": Check that the descriptions entered under "Other" that should be entered as one of the existing categories.
- "Household Size": Check for "0" (possibly meaning, "no other persons than self"). The Household Size should be at least "1."

- **Attendance Log:**

- Group Leaders should write in the names of the participants rather than pass form around for participants to write their own names.
- There are 20 lines for 20 participant names. If more than 20 participants enroll, this is an opportunity for the Survey Coordinator to follow-up with the Group Leader or Master Trainer to find out why the workshop was allowed to exceed the maximum enrollment.
- Group Leaders should take attendance at each session on this form rather than using sign-in sheets at each class and transferring attendance to the Attendance Log.
- Group Leaders may have participants check themselves in, but Group Leaders should also review the Attendance Log at the end of each session to be sure that marks are clear and are in the correct cell.

Important Notes (Coversheet)

1. Site Name

Address

City

State

Zip

Purpose: We collect data on the implementation sites (physical locations) of each workshop.

What to do: (1) Legibly write the site name in the space provided. (2) Make sure the site name matches the site

name on the corresponding Attendance Log. (3) Legibly write the site's address, city, state, and zip in the space provided.

Data entry staff will match this name to an existing site name in the online data entry system. If the data entry staff cannot find a matching site name they will need to add it to the online data entry system. Therefore, provide the complete site name and full address. For example, write "North End Senior Activity Center" rather than just "North End."

Important Notes (Survey)

Name

Purpose: We use the name to make it easier to match a Participant Information Survey to the corresponding attendance recorded on the Attendance Log.

What to do: (1) Make sure the CDSMP participant's name is handwritten legibly in the space provided, and (2) make sure it matches a name on the Attendance Log.

The participant's name is NOT entered into the database.

Therefore, the name can be anything that the participant is comfortable providing, as long as the name is unique within the group of workshop participants. For example, the name may be a nickname, a first name only, a first name plus last name initial, or a code name.

Ensuring confidentiality: In addition to the Group Leader, the Survey Coordinator and any additional data entry staff may see the names on both the Participant Information Surveys and the Attendance Log. If a participant is not comfortable with others seeing their name, de-identify the name before sending the Participant Information Survey to the Survey Coordinator as follows:

- Black out or white out the written names on both the Participant Information Surveys and the Attendance Log.
- Replace the names with a number (unique within the class).